

Chapter 4 – Orders and Inventory

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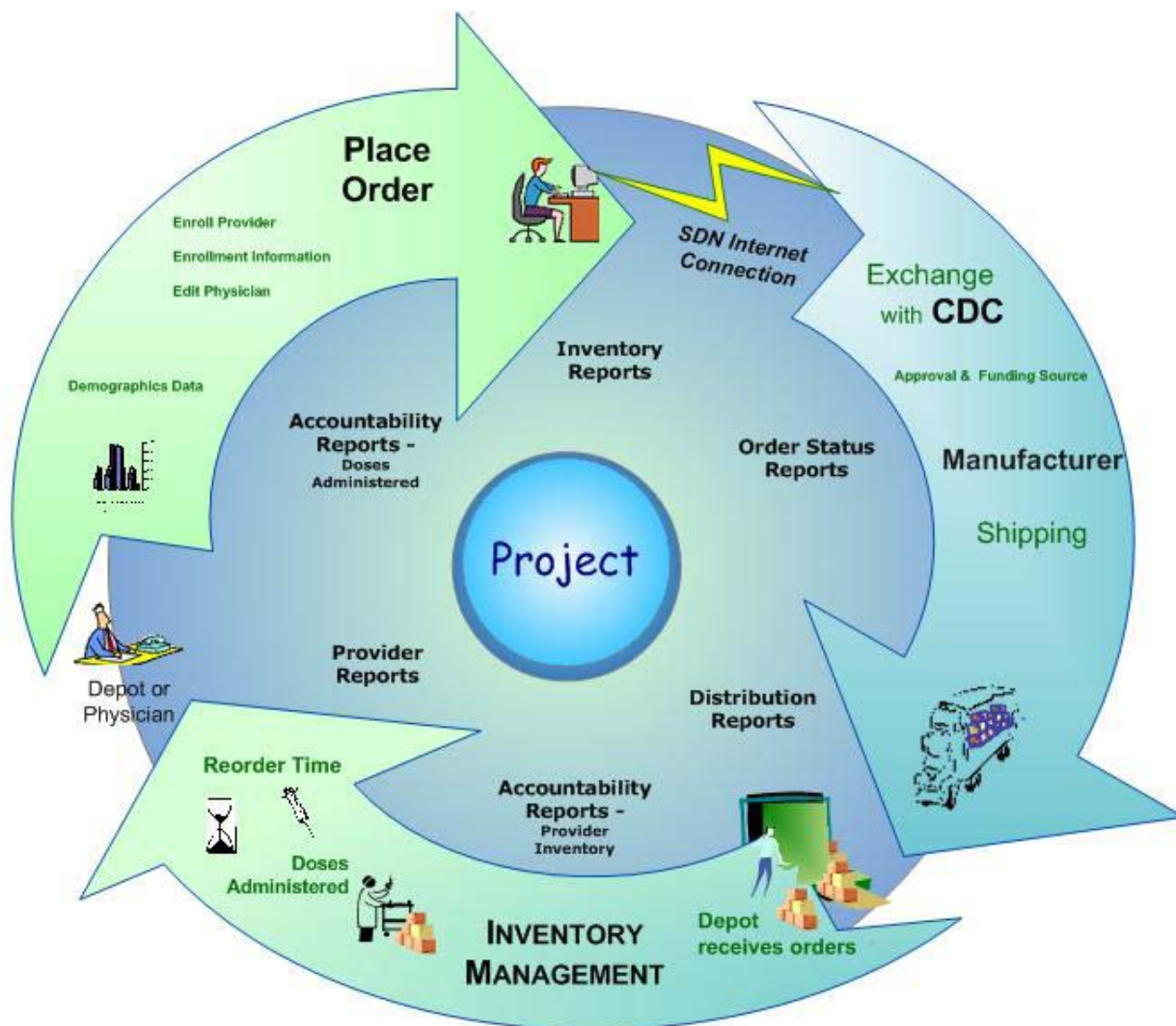
Orders and Inventory

Projects use VACMAN to enter, save, and transmit orders through CDC to manufacturers. Each order can contain information about the project, depot, provider, pricing, delivery, and manufacturer. Working with VACMAN orders requires an understanding of various types of VACMAN orders, the processes that take place when an order is placed, and a general understanding of VACMAN's inventory management.

After an order is transmitted to CDC (regardless of whether it has been shipped from the manufacturer), it is considered to be a receipt. You can open, edit, and manage receipt information in the *Varicella Receipts* and *Bulk Receipts* windows. Receipt information includes the data you entered in the original order, data CDC enters when approving the order, and other receipt details.

When depots receive bulk shipments, they manually enter the receipt information into VACMAN. This allows projects to monitor their order statuses and manage their vaccine inventory. However, when orders are shipped directly to providers (which is normally the case for Varicella orders); CDC updates the order status, which has been provided by the manufacturer.

Overview of the Ordering Process



The Ordering Process

- **Creating and editing an order**

Orders are created and edited in the *Bulk Orders* and *Varicella Orders* windows. You can edit and save new order information indefinitely until you exchange data with CDC. The only requirement for editing nontransmitted orders that have been saved is that the order date must be within 30 days (before or after) the current date.

- **Exchanging data with CDC (transmitting an order)**

Projects exchange data with CDC via a Secure Data Network (SDN) connection. Your program manager has identified three people at your project with authorized access to VACMAN SDN. Those three people have digital certificates that enable them to complete a secure transmittal to CDC.

During each Exchange, CDC updates your project's order status information including the date and time that an order is filled, the time that an order is shipped and the location to which an order is shipped

- **CDC approval**

All orders that are transmitted by using VACMAN must be reviewed by CDC personnel for approval. Approved orders automatically obligate grant money for the order. After CDC approves an order, it forwards the order to a manufacturer or supplier for packaging and distribution.

- If an approved order must be cancelled, CDC will assign a "Cancelled" status to the order and contact the project. Grant money that was obligated for the cancelled order will be returned to the project's funds.
- If either there is insufficient funding to approve an order, or the quantity being ordered is inappropriate, CDC will contact the project for clarification and resolution. If a resolution cannot be found, CDC will modify or cancel the pending order from its records.

- **Vaccine distribution**

Manufacturer's package and ship vaccines for approved orders to either a depot or provider. The destination of an order depends on whether the order is for Bulk or Varicella vaccines. Varicella orders usually contain small quantities and are normally shipped directly to providers. Bulk orders are used for shipping large quantities of all other types of vaccines, and are shipped to project depots and/or contracted distributors.

- **Managing receipts**

After an order is transmitted (regardless of whether it has been shipped from the manufacturer), you can open, edit, and manage its receipt information. Receipt information includes the data you entered in the original order, data CDC enters for approving the order, and other receipt details.

When depots receive bulk order shipments, they manually enter the receipt information into VACMAN. This allows their projects to monitor order statuses and manage inventory.

Order Types

There are two types of VACMAN orders:

- **CDC Orders** - Bulk and Varicella Orders that are transmitted to CDC
- **Non-CDC Orders** – Orders that are **not** transmitted through CDC

CDC orders are placed and processed through CDC by VACMAN's Exchange, while non-CDC orders are directly ordered from and processed by manufacturers and suppliers. Because, non-CDC orders are handled outside of VACMAN, VACMAN classifies them as inventory after they have been received. Thus, this documentation only refers to CDC orders as "orders" and refers to non-CDC orders as Non-CDC inventory.

CDC Orders

CDC orders are grouped into one of two categories: **Non-transmitted and transmitted**. Non-transmitted orders are Bulk and Varicella orders that have been entered and saved, but not yet sent to CDC. Transmitted orders (more commonly referred to as Receipts) are Bulk and Varicella orders that have been entered, saved, and successfully transmitted to CDC. Projects create and edit Bulk and Varicella orders in the *Bulk Orders* and *Varicella Orders* windows, respectively. Any order can be edited indefinitely until it is transmitted to CDC.

Window Sections

There are three main sections to Bulk Orders and Varicella Order windows:

- I. General Section This section is used to enter general information about the order when it is being placed.
- II. Vaccine Section This section displays information about the vaccine being ordered and is updated by CDC.
- III. Optional Section This section can be used to track information that is specific to your project.

Nontransmitted Orders

Create Bulk [UnSorted] Updated: 05/14/2003 By: N2D7

Order Date: 05/14/2003 Wednesday, May 14, 2003

Depot PIN: 999998 YOUR STATE'S IMMUNIZATION PROGRAM

Funding Code: 1 VFC View Funding Balance \$\$

State P.O. No.:

Vaccine: DTAP DTAP W/O THIMEROSAL, 10 X 1 DOSE VIAL PACKAGE

Vaccine Details:

Vaccine Code	Cost	HL7 Code
Doses Per Pkg	CDC Contract	
Manufacturer	NDC No.	CPT Code

Doses: 750 Min. Order 750, Mult. of 10

Optional Details (Not Sent to CDC)



Order Number:

Notes:

Creating Orders

To create a new Bulk or Varicella order, you must understand the general process of creating an order, the sections in which the fields are divided, and the field definitions within each section. Refer to the illustration - [Overview of the Ordering Process](#) at the beginning of this chapter.




How to Create an Order

Step	Action
1	Open an order window.
2	Click the Add Record  button in the toolbar to clear the fields and create a new record.
3	Populate the blank order fields (<i>see</i> Nontransmitted Bulk Order Fields Descriptions or Non-CDC Orders Fields Descriptions below).
4	Click the Save  button in the toolbar to save the record.

Editing Orders

You can indefinitely edit orders that you have entered and saved in VACMAN but have not yet transmitted to CDC.

How to Edit an Order

Step	Action
1	Open a nontransmitted order window. The window opens in view mode.
2	Use the toolbar  arrows to scroll through the order records until you find the one you want to edit.
3	Click the Edit Record  button. This activates the fields in the window.
4	Make your necessary edits to the content in the fields.
5	On the toolbar, click the Save  button.
6	To edit another record, repeat steps 2-5.

Nontransmitted Bulk Orders Field Descriptions

Field	Description
Updated	This field displays the date that the record was last edited. When you create a new order, this field displays the current date.
By	This field displays the username of the person that last edited the current record. When you create a new order, this field displays your username.
A-Z	This drop-down field sorts and re-sorts records. The value for this field defaults to <i>Unsorted</i> , which means VACMAN displays the records in the order in which they were entered (beginning with the oldest record and ending with the most recently entered record). When you are entering a new order on an unpopulated <i>Nontransmitted Orders</i> window, A-Z sorting options are unavailable.
Order Date	By default, this field displays the current date; however, you can change it to any date within 30 days of (before or after) the current date.
Depot PIN	Displays the personal ID number for the depot to which the bulk order was shipped.
Funding Code	This field is used for recording which source will fund the order. When you make a selection, VACMAN automatically displays the funding source's name to the right of this field. Bulk and Varicella orders will always use one of the first three funding codes: 1 (VFC), 2 (G 317), or 3 (State). If your order must use a funding code other than 1, 2, or 3, you must enter the order information in the <i>Non CDC Inventory</i> window. Funding Codes 1, 2, and 3 are standard, so the numbers cannot be reassigned to different funding sources. However, you can manually add additional funding codes for other funding organizations in the Setup Funding section of VACMAN.
State P.O. No.	This field is used for recording a State's purchase order number. It is only available and mandatory for orders that are funded by a State (funding code 3). Purchase order numbers are unique to the order and project.
Vaccine	This field is used for recording the type of vaccine you are ordering. When you select a value for this field, VACMAN automatically displays the number of doses per package in the Order Information section, and the minimum number of doses for that specific vaccine next to the Doses field.
Doses	<p>This field is used for recording the total quantity of doses that you are ordering. To determine a valid number for this field, you must meet two criteria:</p> <ol style="list-style-type: none"> 1. You must order a number of doses that is evenly divisible by the number of doses per package. Manufacturers only ship vaccines in predetermined numbers per package. If you enter a number that is less than the number of doses shipped per package, VACMAN will populate the field with the next largest divisible number. 2. You must order at least the required minimum number of doses. When you select a Vaccine Product, VACMAN displays that vaccine's minimum number of doses next to the Doses field. If you enter a number into the Doses field that is less than the minimum number of doses required, VACMAN will display an error message notifying you of the minimum number of doses requirement and will change the number in the Doses field to that number. <p>Note: If a particular vaccine does not require a minimum number of doses, the value for the Doses field must be equal or greater than the number of doses per package.</p>
View Funding Balance \$\$	This button opens a view-only window that displays information about the funding, costs, and balances associated with the vaccine and order.
<p style="text-align: center;">Vaccine Details</p> <p style="text-align: center;">This section automatically populates information that is specific to the order you are creating.</p>	
Vaccine Code	This field displays a standard VACMAN code that is issued per vaccine type.
Doses Per Pkg	This field displays a predetermined and set number of doses that are shipped per package for each vaccine type.

Field	Description
Manufacturer Code	This field displays a VACMAN code that is sent from CDC to a project to identify the manufacturer of the ordered vaccine.
Cost	This field displays the total cost per dose. The number that is displayed in parentheses next to the cost is the total cost per order.
CDC Contract	This field displays a unique number that identifies the contract between CDC and the manufacturer.
NDC No.	This field displays the National Drug Code (NDC) number, which is defined by the type of vaccine and packaging properties.
HL7 Code	This field displays the unique vaccine codes associated with vaccines designed specifically for Health Level 7 (HL7) transactions. The HL7 code represents the vaccine type.
CPT Code	This field displays the Current Procedural Terminology (CPT) codes, which is used by physicians, health care industry, insurance industry, and Medicare to identify specific procedures used in medical treatments. There are CPT codes associated with specific immunizations using specific vaccines.
Optional Details (Not Sent to CDC) This section tracks information that is specific to your project.	
Order Number	This field is used for assigning a depot's internal tracking number to an order.
Notes	This field is used for recording notes about the order.

Non-CDC Orders

VACMAN classifies orders that are placed outside of CDC as non-CDC orders; thus, information about these orders is recorded in the *Non-CDC Inventory* window. This window eliminates the need for projects to use other applications to manage their non-CDC inventory.

Non-CDC inventory can be for any type of vaccine order (Bulk, Varicella, or other) that is not funded using VFC or G317. Some examples of why projects would place State-funded non-CDC orders are:

- A project qualifies for a lower cost per dose by ordering directly from the manufacturer instead of through CDC.
- CDC does not have a contract with the manufacturer for a particular vaccine (Example: Td, Dt)

Notes:

- Bulk and Varicella VACMAN orders can use VFC, 317 or state funding while Non-CDC orders use State or other funding.
- Projects cannot use VACMAN to submit Non-CDC orders; instead, they must submit them directly to the vaccine manufacturers. However, projects can use VACMAN to track and manage their non-CDC orders as a part of their overall business process.

Non-CDC Inventory Field Descriptions

Field	Description
Updated	This field displays the date that the record was last edited. When you create a new order, this field displays the current date.
By	This field displays the username of the person that last edited the current record. When you create a new order, this field displays your username.
A-Z	This drop-down field sorts and re-sorts records. The value for this field defaults to <i>Unsorted</i> , which means VACMAN displays the records in the order in which they were entered (beginning with the oldest record and ending with the most recently entered record). When you are entering a new order on an unpopulated <i>Non-CDC</i>

Field	Description
	<i>Inventory</i> window, A-Z sorting options are unavailable.
Depot PIN	Select the personal ID number for the depot to which this order was shipped.
Vaccine Code	Select a standard VACMAN code that is issued per vaccine type from the drop down list.
Manufacturer Code	Select the manufacturer of the vaccine from the drop down list.
Doses Per Pkg	Enter the number of doses per package reported by the provider for this vaccine type.
Funding Code	Select the funding code used for this order from the drop down list.
State P.O. No	Enter the State Purchase Order number used for this order.
Cost	Enter the cost of this order reported by this provider.
Doses Ordered	Enter the total quantity of doses reported ordered by this provider.
Add to Inventory	Select this check box if this order is to be included in your project's inventory.
Data Received	Enter the date this order was received.
Time	Enter the time this order was received.
Received By	Enter the initials or person's name who received this order.
Lot	Enter the lot number for this order.
Expires	Enter the expiration date for this vaccine.
Doses Received	Enter the number of doses received.
Optional Data	
Order Date	Enter the date reported for this order.
Order Number	Enter a depot's internal tracking number to an order.
Notes	This field is used for recording notes about the order.
Additional Inventory	Optional field for recording additional information about this order. This field can be assigned a unique name in the <i>Setup function</i> in VACMAN. It is located in <i>Customized -Define Names</i> tab.
Manufacturer Contract	Enter the contract number for the manufacturer of this vaccine order.

Receipts

After an order is transmitted to CDC, it is referred to as a receipt. You can open, record, and manage receipt information in the *Bulk Receipts* and *Varicella Receipts* windows. Receipt information includes data your project entered in the original order, data CDC enters for approving the order, and other receipt details.

Bulk and Varicella receipts are opened by using either the menu bar or VACMAN at a Glance.

Bulk Receipts

Because bulk orders are shipped directly to project depots, it is easy for projects to manage their receipt information. When a depot receives an order, a depot representative enters the receipt information into VACMAN, which is then available for the projects to monitor and manage.

Window Sections

There are four main sections to the Bulk Receipts window:

- I. Original Order** - Displays information that projects enter when an order was created. (*Read-only*)
- II. CDC Approval** - Displays information that CDC populates when an order is approved or pending approval. The data in the CDC Approval section is updated during an Exchange. (*Read-only*)
- III. Optional Details** - This section is used to track information that is specific to your project. (*Editable*)
- IV. Receipt Details** - This section is used by depots to record receipt information.

The screenshot shows the 'Bulk Receipts' window with the following sections and data:


- Original Order:**
 - Order Date: 06/03/2002 Monday, June 3, 2002
 - Depot PIN: 999996 GIV-GENERAL INJECTABLES & VACCINES
 - Funding Code: 1 VFC
 - State P.O. No.:
 - Doses Ordered: 5600 Doses Per Pkg: 10
 - Vaccine Code: MMR Manufacturer: MSD
 - NDC No: 0006-4681-00 CPT Code: 90707
- CDC Approval:**
 - CDC P.O.: 24061239
 - P.O. Date: 06/04/2002
 - Status: 07 Received in Excess
 - Doses Approved: 5600
 - CDC Contract: 200-2002-00379
 - Cost: \$ 15.64 (\$469.20)
 - Transmitted: 06/03/2002
- Optional Details (Project Use Only):**
 - Ord Num: 0123556 ORDER
 - Notes:
- Receipt Details:**
 - Received: 11/15/2003 Time: 00:00
 - Received By: MCD
 - Lot: 123
 - Expires: 11/02/2004
 - Doses Per Pkg: 10
 - Doses Received: 30
 - Buttons: Remove from inventory, Leave in inventory

Additional window elements include a title bar 'Transmitted Orders', a subtitle 'Bulk Receipts', a sort dropdown 'UnSorted', and update information 'Updated: 04/15/2003 By: NZD7'. A '3 of 3' indicator is visible in the bottom right of the Receipt Details section.

How to open a Bulk Receipt from the menu bar

Step	Action
1	Click the Data menu option.
2	Select Bulk Receipts .

How to open a Bulk Receipt from VACMAN at a Glance

Step	Action
1	From the Data tab in <i>VACMAN at a Glance</i> , click the Bulk Receipts .
2	The <i>Bulk Receipts</i> window appears on top of the <i>VACMAN at a Glance</i> window.
3	VACMAN determines which record is displayed by the value set in the A-Z drop-down field.
4	Use the toolbar  arrows to scroll through the order records until you find the one you want to edit.

Bulk Receipts Field Descriptions

Field	Description
Original Order This <i>read-only</i> section displays information that was entered when the order was created.	
Order Date	This numeric field displays a date that is relevant to your project when the order was entered into VACMAN.
Depot PIN	Displays the personal ID number for the depot to which the bulk order was shipped.
Funding Code	This field displays a numeric value specifying which source funded the order. Bulk receipts will always display one of three funding codes: 1 (VFC), 2 (G 317), or 3 (State), with the name of the funding source displayed to the right of the field, respectively.
State P.O. No.	When an order uses funding code 3 (State), this field displays the State's P.O. Number.
Doses Ordered	This field displays the total quantity of doses that were ordered.
Doses Per Pkg	This field displays a predetermined and set number of doses that are shipped per package for each vaccine type.
Vaccine Code	This field displays a standard VACMAN code that is issued per vaccine type.
Manufacturer	This field displays a VACMAN code that identifies the vaccine manufacturer.
HL7 Code	This field displays the unique vaccine codes associated with vaccines designed specifically for HL7 (Health Level 7) transactions. The HL7 code represents the vaccine type.
NDC No.	This field displays the National Drug Code number, which is defined by the type of vaccine and packaging properties.
CPT Code	This field displays the Current Procedural Terminology (CPT) codes, which is used by physicians, health care industry, insurance industry, and Medicare to identify specific procedures used in medical treatments. There are CPT codes associated with specific immunizations using specific vaccines.
CDC Approval This <i>read-only</i> section displays information that CDC populates when an order is approved or pending approval. The data in these fields are updated when you execute an Exchange.	
CDC P.O.	This field displays CDC's purchase order number.
P.O. Date	This field displays the date that CDC's purchase order number was generated.

Field	Description
Status	This field displays the status of the order when you last executed an Exchange.
Doses Approved	This field displays the total number of doses that CDC approved for the order.
CDC Contract	This field displays a unique number that identifies the contract between CDC and the manufacturer.
Cost	This field displays the total cost per dose. The number next to it in parentheses is the total cost per order.
Transmitted	This field displays the date that the order was transmitted to CDC.
Optional. Details This section tracks information that is specific to your project and is editable.	
Order Num	This field is used for assigning a depot's internal tracking number for an order.
Field 1	This field is used to record any other information that is specific and meaningful to your project. You can change the title of this field in the <i>Define Names</i> window.
Notes	This field is used for recording notes about the order.
Receipt Details This section is used by the depots to record receipt information and is editable.	
Received	This field is used for recording the date that the depot receives the order.
Time	This field is used for recording the time that the depot received the order.
Received By	This field is used for recording the name or title of the person who accepted the shipment.
Lot	This field is used for recording the vaccine lot number. Manufacturers assign lot numbers to vaccine batches, and they are derived by the vaccine's expiration date.
Expires	This field is used for recording the vaccine's expiration date.
Doses Per Pkg	This field is used for recording actual number of doses that the depot received per package. This field is used as a precautionary measure in case the manufacturer ships a different number of doses per package than that which was ordered.
Doses Received	This field is used for recording the total number of doses that the project received.
Remove from inventory	This radio button is used to remove the amount entered in doses received from your inventory.
Leave in inventory	This radio button is used to leave the amount entered in doses received in your inventory.
Add To Inventory	This field is used for adding the vaccine to your depot's inventory. By default, this option is checked. If you do not want to add the vaccine to your inventory, uncheck the box.
"#" of "#"	This field displays the shipment number out of the total shipments per order. For example, the receipt information might be for shipment 2 out of 3 total shipments.

Varicella Receipts

The manufacturer of Varicella provides CDC with the order status. CDC then updates the order status. The manufacturer then ships these orders directly to providers. Therefore, it is the providers' responsibility to contact the projects with receipt information.

Window Sections

There are four main sections to the Varicella Receipts window:

- I. Original Order** Displays information that projects enter when an order was created. (*Read-only*)
- II. CDC Approval** Displays information that CDC populates when an order is approved or pending approval. The data in the *CDC Approval* section is updated during an Exchange. (*Read-only*)
- III. Optional Details** This section is used to track information that is specific to your project. (*Editable*)
- IV. Receipt Details** This section is used by depots to record receipt information.

The screenshot shows the 'Varicella Receipts' window with a title bar 'Transmitted Orders'. The window is divided into four main sections, each with a label and a bracket on the left side:

- I. Original Order**: This section contains fields for Order Date (06/13/2002), Provider PWR (P00780), Fending Code (2), State P.O. No., Doses Ordered (36), Vaccine Code (VAR), HLT Code (21), NDC No (0086-4827-08), and CPT Code (90796).
- II. CDC Approval**: This section contains fields for CDC P.O. (0), P.O. Status (1), Status (01), Doses Approved (0), CDC Contract Cost (\$ 41.44), and Transmitted Date (06/13/2002).
- III. Optional Details**: This section contains fields for Order Name, Notes, and Signature.
- IV. Receipt Details**: This section contains fields for Received (1), Doses (0), Tracking, Lot, and Expires (1).

The window also has a 'Unsorted' dropdown menu and an 'Updated' date/time field (06/13/2002 10:00 AM).

Varicella Receipt Field Descriptions

Field	Description
Original Order	
This <i>read-only</i> section displays information that was entered when the order was created.	
Order Date	This numeric field displays a date that was relevant to your project when the order was entered into VACMAN. It is the date that you entered the order into VACMAN.
Provider PIN	Displays the provider's personal ID number (where the Varicella order was shipped).
Funding Code	This field displays a numeric value specifying which source funded the order. Varicella receipts will always display one of three funding codes: 1 (VFC), 2 (G 317), or 3 (State), with the name of the funding source displayed to the right of the field, respectively.
State P.O. No.	When an order uses funding code 3 (State), this field displays the State's P.O. Number.
Doses Ordered	This field displays the total quantity of doses that were ordered.
Vaccine Code	This field displays a standard VACMAN code that is issued per vaccine type.
HL7 Code	Displays the unique vaccine codes associated with vaccines designed specifically for Health Level 7 (HL7) transactions. The HL7 code represents the vaccine type.
NDC No.	This field displays the National Drug Code (NDC) number, which is defined by the type of vaccine and packaging properties.
CPT Code	This field displays the Current Procedural Terminology (CPT) codes, which are used by physicians, the healthcare industry, the insurance industry, and Medicare to identify specific procedures used in medical treatments. There are CPT codes associated with specific immunizations using specific vaccines.
CDC Approval	
This <i>read-only</i> section displays information that CDC populates when an order is approved or pending approval. The data in these fields are updated when you execute an Exchange.	
Transmitted	This field displays the date that the order was transmitted to CDC.
Status	This field displays the status of the order when you last executed an Exchange.
CDC P.O.	This field displays CDC's purchase order number.
P.O. Date	This field displays the date that CDC's purchase order number was generated.
Doses Approved	This field displays the total number of doses that CDC approved for the order.
CDC Contract	Displays a unique number that identifies the contract between CDC and the manufacturer.
Cost	This field displays the total cost per dose (rounded off to the ten-thousandth of a dollar). The number next to it in parentheses is the total cost per order.
Optional Details	
This section tracks information that is specific to your project.	
Order Num	This field is used for assigning an internal tracking number for the order.
Notes	This field is used for recording notes about the order.
Signee	This field is used for recording the name of the employee who accepted the shipment.
Receipt Details	
Doses	This field displays the total number of doses that the provider received.
Tracking	This field displays the tracking number assigned to the order. Tracking numbers are automatically generated by the shipping company and electronically entered into VACMAN when an order is shipped to a provider.
Lot	This field displays the vaccine lot number. Manufacturers assign lot numbers to vaccine batches, and they are associated with the vaccine's expiration date.
Expires	This field displays the vaccine's expiration date.

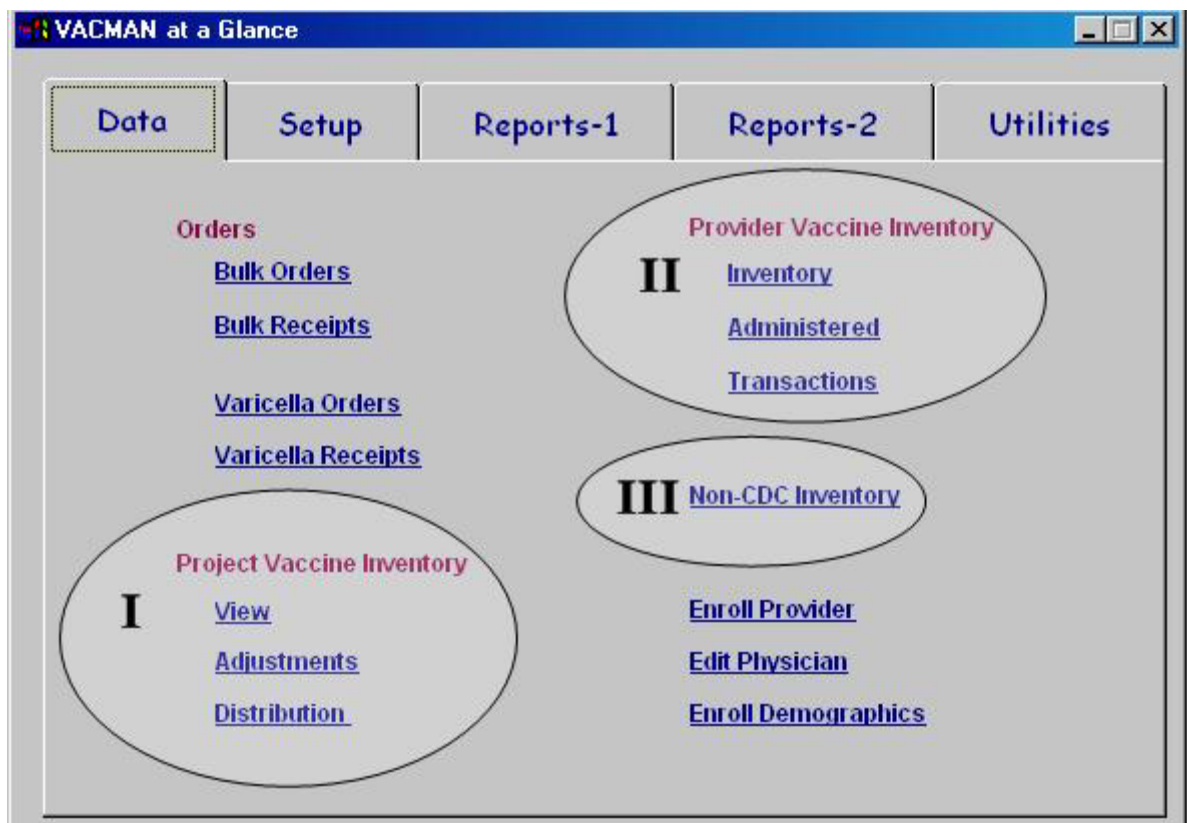
Inventory

Inventory Overview

VACMAN allows you to manage your entire vaccine inventory, which includes CDC and Non-CDC inventory. VACMAN groups inventory into three categories:

- I. Project Inventory** - This inventory includes all bulk orders that are placed through CDC and shipped directly to a depot.
- II. Provider Inventory** - This inventory is specific to the PIN and includes all inventories the provider has on hand on a particular date.
- III. Non-CDC Inventory** - Also referred to as *Non-CDC Orders* or Other Inventory Orders/Receipts, this inventory includes all orders that you make directly with manufacturers outside of CDC contracts. Refer to [Non-CDC Orders](#) section earlier in this chapter.

All three types of inventory can be tracked and managed in VACMAN in various inventory and reports windows.



Quick Reference Guide to Project Vaccine Inventory Menu Options

View Inventory



Adjustments



Distributions



Managing Project Inventory

Project Inventory windows include information about all vaccines that are shipped to, stored in, and distributed from depots. Use the Project Inventory windows to view, make adjustments to, and distribute your depot inventory.

View Inventory

Projects often review how much vaccine they have on hand or have ordered. Use the *View Inventory* window to view all of the vaccines that are expired and/or on hand in your depots, or that have not yet been received.

View Inventory

Inventory

Unsorted

Unsorted

☐ Only Display Lots Not Expired
☐ Only Display On Hand More Than Zero

Depot	Vaccine	Lot	Lot	Expires	Date Recd	On Hand	+
999996	DT	881	Lot	8/2/1998	10	8	
999996	DT	882	Expiry Date	8/2/6/2000	10	8	
999996	DT	452-939	LED	88/3/1/998	10	8	
999996	DT	455-179	LED	84/3/6/2000	10	8	
999996	DT	462-311	LED	82/2/6/2001	10	8	
999996	DT	478-841	LED	12/6/1/2001	10	8	
999996	DT	473-206	LED	83/6/1/2002	10	8	
999996	DT	7D91842	CONN	84/2/31/998	10	8	
999996	DT	U8914AA	CONN	84/2/6/2001	10	8	
999996	DT	U8914AB	CONN	88/2/3/2001	10	8	
999996	DT	U8296AB	AVENTIS	87/11/2002	10	8	
999996	DT	U8396AC	AVENTIS	88/6/2/2003	10	1729	
999996	DTAP	8844778	CONN	88/3/6/1998	15	8	
999996	DTAP	8878148	CONN	81/2/1/2000	15	8	
999996	DTAP	888418	CONN	85/2/4/2000	15	8	
999996	DTAP	448-451	LED	88/3/1/998	10	8	

You can choose whether you want to view only the lots that have not expired or only the vaccines that your depot has on hand. If you do not choose either of these options, the *View Inventory* window will show all vaccines that are usable and on hand, as well as the vaccines that have expired.

How to View Project Inventory

Step	Action
1	From <i>VACMAN at a Glance</i> , click the Data tab.
2	Click View under the <i>Project Vaccine Inventory</i> header.
3	<p>Use the A-Z sorting category to sort <i>View Inventory</i> records by:</p> <ul style="list-style-type: none"> • Vaccine • Lot number • Expiry date <p>After you select an A-Z sorting category, use the vertical scroll bar to scroll to the <i>View Inventory</i> record you want to view.</p> <p>You can also use the check boxes to select the following:</p> <ul style="list-style-type: none"> • Only Display Lots Not Expired • Only Display On Hand More Than Zero

Adjustments

CDC recommends that you manage your vaccine inventory closely. As a part of this inventory management, you will occasionally need to adjust the inventory stored in your depot(s). Use the *Inventory Adjustments* window to make such adjustments.

Sorting Adjustments Records

Use the **A-Z** sorting category to sort *Adjustment* records by:

- Lot
- Vaccine and Lot number
- Date entered, PIN, Vaccine
- PIN, Date, Vaccine
- Depot, PIN, Date, Vaccine

Adjustments Field Descriptions

Field	Description
Add / Subtract	Whether you are adding or subtracting vaccines.
Date	The date you make the adjustment.
Depot PIN	The PIN for the depot that is making the adjustment.
Vaccine	The vaccine type.
Lot	The lot number of the vaccine.
Doses	The number of vaccines.
Notes	Any additional notes that you deem necessary to clarify the adjustment.

Examples of adjustments

- When the Add to inventory check box was not checked on a bulk receipt
- When you need to account for vaccine that was added to your inventory but returned to the manufacturer.
- When your hand count and your computer's reported inventory do not match.

Distributions

Because of the large quantities, depots usually redistribute bulk orders in more than one shipment to more than one provider. Use the *Distribution* window to distribute vaccines from your depot(s) to providers.

Distribution Unlocked Default: 03/31/2003
Dep: 16737

Date Entered: 03/31/2003 Monday, March 31, 2003
Date Shipped: 03/31/2003 Monday, March 31, 2003
Depot PIN: 999999 US VACCINES
Provider PIN: 12345 GENERAL HOSPITAL, DENVER, CO
Vaccine: D1 DIPHTEPHAL & TETANUS TOXOID ADJUVANTED
Lot: L123456 Manufacturer: AVENTIS
Doses: 1111 Doses Per Vial: 15
☒ Shipped Doses Available: 1779
Expires: 05/02/2003

Notes:

Provider Menu Shipments Cancel Data Show/Hide

Sorting Distribution Records

Use the A-Z sorting category to sort *Distribution* records by:


- Lot
- Vaccine, Lot
- Date, PIN, Vaccine
- PIN, Date, Vaccine
- Depot, PIN, Date, Vaccine

After you select an A-Z sorting category, use the toolbar  arrows to scroll through the records until you find the one you want to view. Otherwise, use the **Search**  button to search for a specific record.

Distribution Field Descriptions

Field	Description
Date Entered	The date the distribution is entered into VACMAN.
Date Shipped	The date the vaccine is scheduled to be distributed to the new location.
Depot PIN	The depot PIN where the vaccine is located.
Provider PIN	The provider PIN where the vaccine will be shipped.
Vaccine	The vaccine type.
Lot	The lot number of the vaccine.
Doses	The number of doses that are being distributed.
Shipped	Whether or not the vaccine has been shipped to the new location.
Notes	Any additional notes that you deem necessary to clarify the distribution. These notes are shared with the provider because they are included on any documentation that contains distribution information.

Buttons

Button	Description
Provider Memo	<p>Opens the <i>Provider Memo</i> window that is used to record any internal notes your project wants to document about the specified provider. These notes are for internal use only and are not shared with the provider.</p> <p>To record a provider memo, click the Provider Memo button, click the Edit Record  button in the toolbar, type a memo and click the close "X" at the top of the window.</p>
Allowance	Opens a view-only <i>Allowance</i> window that displays the number of doses (per vaccine) that a provider is eligible to receive. This number is derived from the calculations on the <i>Enrollment Demographics</i> window, which are derived from the information entered in the <i>Setup Enrollment</i> window.
Current Data	Opens the view-only current <i>Data for PIN</i> window that displays the history of all vaccine distribution records for a specific provider. The information is sorted first by date, then by vaccine, and finally by the number of doses shipped.
Short Cuts	Opens a view-only <i>Vaccine Shortcuts</i> window that displays the shortcuts for available vaccine in your inventory. This window is helpful for quickly learning a vaccine's shortcut if you must create several records for the same type of vaccine.
Back Orders	Displays vaccinees orders that were not able to be completely filled at the time of the original order.

Managing Provider Inventory

Provider Inventory windows include information about all vaccines that are shipped to, stored by, and administered or distributed from providers. Information about these vaccines must be acquired from providers, as well as entered into and maintained in VACMAN by the project.

Under normal operations, providers will contact projects with the information that is necessary to populate the *Provider Inventory* windows.

Available Inventory

Use the *Provider Vaccine Inventory* window to add, edit, and review the number of doses a provider reports to be on hand on a specific date. The information in this window is not affected or changed by any other window in VACMAN. It is strictly used to record and monitor a provider's accountability for vaccine. When you open the *Provider Vaccine Inventory* window, VACMAN displays a record with information about the number of doses available according to the date the record was entered, the provider PIN, and the vaccine type.

Sorting Inventory Records

Use the A-Z sorting category to sort *Inventory* records by:

- Vaccine
- Lot
- Date, PIN, Vaccine
- PIN, Date, Vaccine

After you select an A-Z sorting category, use the toolbar  arrows to scroll through the records until you find the one you want to view. Otherwise, use the **Search**  button to search for a specific record.

Buttons

Button	Description
Current Data	Opens the view-only current <i>Data for PIN</i> window that displays the history of all vaccine inventory records for a specific provider. The information is sorted first by date, then by vaccine, and finally by the number of doses available.
Short Cuts	Opens a view-only <i>Vaccine Shortcuts</i> window that displays the shortcuts for active vaccines your project has entered into VACMAN.

Doses Administered

Use the *Doses Administered* window to record and manage the number of doses that a Provider reports to have administered to patients. When you open the *Doses Administered* window, VACMAN displays a record with information about the number of doses administered according to the date the record was entered, the Provider PIN, and the vaccine type.

Doses Admin [A-Z] UnSorted Updated 05/08/2003 By NZD7

Date Reported: 08/30/2003 Saturday, August 30, 2003

Provider PIN: 45405B GENERAL HOSPITAL

Public/Private: 2 PRIVATE VACCINE

Vaccine: DTAP DIPH. & TET. TOXOIDS & ACELLULAR PERTUSSIS VACCINE

Dose in Series: 1 ☒ Use New Age Categories

<1 Yr	2	19-24 Years	0	Medicaid	5
1 Yr	2	25-44 Years	0	Uninsured	0
2 Years	0	45-64 Years	0	Underins	0
3-5 Years	1	65+ Years	0		
6 Years	0	Unknown Age	0		
7-10 Years	0	Total, All Ages	5		
11-12 Years	0				
13-18 Years	0				
				Total, All Groups	5


Sorting Doses Administered Records

Use the **A-Z** sorting category to sort *Doses Administered* records by:



- Date, PIN, Vaccine
- PIN, Date, Vaccine
- PIN, Vaccine, Date

After you select an A-Z sorting category, use the toolbar  arrows to scroll through the records until you find the one you want to view. Otherwise, use the **Search**  button to search for a specific record.

How to Display the History of Doses Administered

Step	Action
1	From <i>VACMAN at a Glance</i> , click Administered under the <i>Provider Vaccine Inventory</i> heading.
2	Use the toolbar  arrows to scroll through the order records until you find the one you want to edit.
3	Click the Current Data button (or use the keyboard shortcut ALT+U).
4	A table displays doses administered date records previously entered for that Provider.

How to Add a Doses Administered report

Step	Action
1	From <i>VACMAN at a Glance</i> , click Administered under the <i>Provider Vaccine Inventory</i> heading.
2	Click the Add Record  button in the toolbar to clear the fields and create a new record.
3	Populate the blank fields.
4	Click the Save  button in the toolbar to save the record.

Transactions

Use the *Transactions* window to record and manage all vaccines that were:

- Viable and returned from a provider to a depot
- Lost or damaged while being shipped to either a provider or depot
- Expired
- Spoiled
- Lost after a provider or depot received the shipment, or was unaccounted for in the provider's inventory
- Unusable for a miscellaneous reason, such as failure to store properly or refrigeration failure
- Transferred from one provider to another provider

Distribution - Other Transactions

Transactions

UnSorted

Updated: 05/15/2003
By: NZD7

Transaction: 7 Refrigeration failure reported by Provider

Date Entered: 08/15/2003 Friday, August 15, 2003
Transaction Date: 10/10/2003 Friday, October 10, 2003

Depot Pin: 999998 YOUR STATE'S IMMUNIZATION PROGRAM
Provider Pin: 037496 GENERAL HOSPITAL DRAKE RAMORAY

Vaccine: DT

Lot:

Doses: 1

Manufacturer:
Doses Per Pkg:
Expires: / /

☒ Vaccine Received from Provider

Notes: Closed Tuesdays


ShortCuts
Provider Memo
Current Data

Sorting Transaction Records



Use the **A-Z** sorting category to sort *Transaction* records by:

- Lot
- Vaccine, Lot
- Date, PIN, Vaccine
- PIN, Date, Vaccine
- Depot, PIN, Date, Vaccine

How to Display the History of Transactions

Step	Action
1	From <i>VACMAN at a Glance</i> , click Transactions under the <i>Provider Vaccine Inventory</i> heading.
2	Use the toolbar  arrows to scroll through the records until you find the one you want to edit.
3	Click the Current Data button.
4	A table displays with data entered for that provider.

How to Add a Transactions

Step	Action
1	From <i>VACMAN at a Glance</i> , click Transactions under the <i>Provider Vaccine Inventory</i> heading.
2	Click the Add  button in the toolbar to clear the fields and create a new record.
3	Populate the blank fields.
4	Click the Save  button in the toolbar to save the record.


Transaction Codes

When you use transaction code number **2**, the project's inventory is affected. When you use any other transaction code, the amount of vaccine that can be distributed to a provider is affected.

Transaction code definitions

Code	Definition
2	Returned by provider in a viable state
3	Spoilage reported by provider
4	Expiration reported by provider
5	Lost or damaged in transit to provider
6	Failure to store properly upon receipt by provider
7	Refrigeration failure reported by provider
8	Transferred between providers in a viable state
11	Lost or unaccounted for in provider inventory
12	Other - Not usable, reported by provider

Buttons

Button	Description
Short Cuts	Opens a view-only <i>Vaccine Shortcuts</i> window that displays the shortcuts for every vaccine your projects has entered into VACMAN.
Provider Memo	<p>Opens the <i>Provider Memo</i> window that is used to record any internal notes your project wants to document about the specified provider. These notes are for internal use only and are not shared with the provider.</p> <p>To record a provider memo, click the <i>Provider Memo</i> button, click the Edit  button in the toolbar, type a memo and click the close "X" at the top of the window.</p>
Current Data	Opens the view-only current <i>Data for PIN</i> window that displays the history of all vaccine inventory transactions (as described above). The information is sorted first by the date the vaccine was ordered, then by the number of doses accounted for in the transaction, then by the date the order was transmitted, then by CDC PO number, and then the date the doses were shipped.
